

Investor Day - How to organize the event efficiently

One of the most dynamic activities for any Investor Relations department is organizing an Investor/Analyst Day.

On the one hand, analysts have an opportunity to meet in person the company's officers and gather a wide spectrum of information, while also strengthening their relationship with the company's management. Meanwhile, the company has an opportunity to communicate its strategy more comprehensively and in a more favorable context.

A successful Investor Day requires a very high level of transparency. At these events, analysts hope to gain a much deeper understanding of the company and an extremely detailed view of the business, which often is impossible to convey in a presentation, which typically lasts an hour or so.

The officers and key executives should present their respective departments, explaining their strategy, structure and expected results.

Although each department should be responsible for preparing their own presentation, the IR department should consolidate the presentations from a visual standpoint and especially in terms of content, seeking to unify the complementary messages and present an overall vision.

Investor Day should reinforce the personal contact between management and analysts during the event, and it is recommended that key executives participate for the entire day. Effectively training lecturers thus becomes fundamental, especially those who do not have regular contact with investors.

Analysts expect opportunities for informal meetings to arise throughout the day, and it is precisely on these occasions when they will ask the most complicated questions. Therefore, the IR team should plan as much as possible the individual contacts of key executives, determining in advance where they will sit and introducing executives to analysts who have already expressed specific interests. In short, they should truly act as the hosts of the event.

The IR officer should divide his attention among all guests, avoiding prioritizing analysts or investors who already have more contact with management. A comprehensive list of the guests' profiles is essential for planning these contacts.



When organizing, you can never be too careful, because after all you are showcasing your company. These events usually last from one to three days, and the schedule depends on what each company wants to present. Visits to operational or distribution centers and plants should highlight your company's competitive advantages, such as high technology, efficiency, market leadership, etc., though always tied to a central theme. External speakers often take part in these events, which include clients, industry specialists and industry associations, depending on the specific focus. These speakers can and should act as external validators of the ideas to be communicated by the company, bringing greater objectivity and credibility to the event. The schedule and invitations should be prepared in advance, especially if the company plans to receive investors from abroad. To allow for conciliating agendas, international flight logistics, visas, etc., international participants should be invited at least four months in advance. For example, some companies send invitations at the start of the year for Investor Days to be held only in November.

The company is responsible for the event's organization and logistics, which includes invitations, local transport, meals, presentation material, entertainment and accommodation. The cost of an Investor Day event depends on the exact program and can be very expensive. Keep in mind, however, that this is an investment in your company's relationship with the market, and as with any investment, the prospects for returns should be carefully assessed. An event of this importance can elevate the dialogue with the market to another level, with benefits for investors and analysts as well as for management, who gain greater mutual understanding. After all, a more comfortable relationship with management and a thorough comprehension of the company can become decisive factors when it comes time to invest.

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